Senate File 295 Implementation Advisory Panel

DATE: TUESDAY, OCTOBER 22, 2013
TIME: 10:00 A.M. – 12:00 P.M.

LOCATION: ISAC BUILDING, CONF. ROOM A

FACILITATOR	Lucas Beenken / Julie Roisen					
ATTENDEES	X	Mike Albers – Polk County Auditor's Office		Nick Klein – Vanguard	X	Monica Peterson – Solutions (phone)
		Al Ales - Thomson Reuters		Ken Kline – Cerro Gordo County Auditor	X	Julie Riesselman - Tyler
	X	Kay Arvidson – IDR Communications		Cris Knobbe – Tyler	X	Virginia Roberts – Thomson Reuters (phone)
	X	Carla Becker – Delaware County Auditor (phone)	X	Deb Kout – Solutions (phone)	X	Julie Roisen – IDR Property Tax Division Administrator
	X	Lucas Beenken – Public Policy Specialist	X	Ryan Lafrenz – Polk County Auditor's Office		Jerry Ross – Tyler
	X	Marsha Carter – Shelby County Auditor	X	Nicole Maakestad – Marshall County Programmer	X	Rodney Ross – Cerro Gordo County Programmer
	X	Mark Castenson – Linn County Assessor's Office	X	Mary Maloney – Polk County Treasurer	X	Ed Saunders – Cedar Rapids Assessor's office
	X	Susan Chambers – IDR Property Tax	X	Lucy Martin – Story County Auditor	X	Sandy Shonka – Cerro Gordo County Auditor's Office
	X	Jen Channell – Thomson Reuters (phone)	X	Dale McCrea – Muscatine County Assessor	X	Peggy Smith – Page County Assessor (phone)
	X	Darrell Fremont – DAS ITE (phone)	X	Deb McWhirter – Butler County Assessor	X	Janine Sulzner – Jones County Auditor
	X	Jeff Garrett – Washington County Treasurer	X	John Moreland – City of Clinton Assessor	X	Gordon Thompson – Linn County Deputy Auditor (phone)
	X	Stacie Herridge – Story County Deptuy Auditor	X	Brad Miller – Vanguard	X	Kim Veeder – Black Hawk County IT Director (phone)
	X	Sam Huffman – Solutions (phone)	X	Erin Mullenix – Iowa League of Cities	X	Beth Weeks – Cedar Rapids Chief Deputy Assessor
	X	Carrie Johnson – Local Government DOM	X	Ted Nellesen – DOM Local Government	X	Jeanean Willems – Tyler
	X	Dianne Kiefer – Wapello County Treasurer			X	Lou Zabel – Scott County Assessor's Office

Agenda topics	Notes:
1. Opening Remarks / Introductions	- Meeting opened up with introductions of attendees. - Julie reviewed the agenda and our purpose for the meeting. - Our goals for the meeting are to decide issues related to: - Splits & Combinations - The order of Credit and Exemption in tax statement calculations - Rounding of Credits/Payments for statements - Outline future discussion for the BPTC process for 2014 Assessments and beyond - Discuss draft rules status and timing - Discuss and decide on other issues - Our next meeting date
2. Other Issues: Replacement Claims	- Replacement Claims and Reporting: Separate TIF base and TIF increment and report separately on the Replacement Claim. - Replacement Claim dollars go to the TIF special revenue fund and are used to reduce the debt obligation.

3. Other Issues: 100% DOM Value	• Clarify for the BPTC submission and retrieval process that 100% DOM Value is the Assessed Value less Exemptions except Military. • Change Assessor File submission for unit identification to indicate that zero is not a null field. A null field = a blank field. • Final instructions for the data elements file needs a correction – there are 23 fields, not 22 fields. • For the next meeting – can Field # 17 for Improvements be left blank? This is the second field for improvements.
4. Other Issues: Assessor Submission File	• Change Assessor File submission for unit identification to indicate that zero is not a null field. A null field = a blank field.
5. Other Issues: Data Elements File	• Final instructions for the data elements file needs a correction – there are 23 fields, not 22 fields. • Field # 17 for Improvements can be left blank. This is the second field for improvements.
6. Credits & Exemptions Order	Apply in this order: 1. Military Exemption – subtract out before calculation the credit. 2. Calculate the BPTC – this should never go below zero, there should always be tax due. 3. Homestead 4. Elderly
5. Splits & Combinations – How to handle these with the Unit ID number: Cty # Ap Year Unit # Count Sequence xx xxxx xxxx xxxx xxxx	1/16/14 – 1/29/14: No changes 1/30/14 – 6/30/14: Count and Sequence components may change 6/30/14 – 7/15/14: No changes to commercial, industrial or railroad classifications
6. Parking Lot	• How to manage retirement of units – how to do and who is the responsible party. This will be discussed at a future meeting.
7. Next Meeting Location	• Wednesday November 20, 11:00 – 1:00, Polk County Administration Building, 2nd & Court, Des Moines, IA. • Parking ramp is across the street – enter from 3rd Street.
8. Agenda Items for next meeting	• Going Live with the Unit Generator Id Files – Status, Issues & Answers • How Auditor and Assessor files will coordinate in subsequent years • Update on Draft Rules

#	ACTION ITEMS	RESPONSIBLE	DUE DATE
1	Clarify for the BPTC submission and retrieval process that 100% DOM Value is the Assessed Value less Exemptions except Military.	Julie Roisen	11-20-13
2	Final Instructions for Data Elements File correction – there are 23 fields, not 22 fields.	Julie Roisen	11-24-13
3	Final Instructions for Data Elements File: Field # 17 for Improvements be left blank? This is the second field for improvements.	Julie Roisen	11-24-13
4	Change Assessor File submission for unit identification to indicate that zero is not a null field. A null field = a blank field.	Julie Roisen	11-24-13
5	The Unit Generator Website will be live for the next meeting. Counties will be submitting files.	County Assessors	11-01-13
6.	Discuss with software vendors how Assessor and Auditor Files will coordinate in future years	Julie Roisen	Next Meeting Discussion